

The Essential Guide to... Monitoring & Evaluation

What is monitoring?

Monitoring is a routine and systematic process of collecting and analyzing information about your project and activities. It provides a valuable means of finding out how well your organization is meeting its outcomes and specific targets and should be an integral part of your project planning. An effective monitoring system will help you answer questions about your project such as:

- How well are we doing?
- Are we doing the right things?
- What difference are we making?

Monitoring is simply about recording information about the people who use your services. You may be looking, for example, at whether demand is increasing, if the service is being accessed by people with disabilities or checking feedback and comments in order to make any necessary improvements. Monitoring is an ongoing part of any organization and will help you measure progress, identify project strengths and remedy any weaknesses and ultimately feeds into the overall evaluation of the service. Additionally, it also fosters a commitment to quality, learning and development.

What is evaluation?

Evaluation uses information collected through monitoring and other sources to see how well your organization is performing. For example, is it doing what it set out to do? Is it reaching its target group? What have been the results?

Evaluation of work helps assess the value of a project, to learn from any mistakes and to celebrate successes. It will also help to determine the future development of the service – for example, it has become apparent that demand has increased due to a nearby service closing down and there is now a gap in local need or a particular venue has proved inaccessible or the timing of certain activities has been unpopular. Some of the other benefits of undertaking an evaluation include:

- Providing evidence to funding bodies and stakeholders about how you are delivering a service, its outcomes and the difference you are making
- Fostering a clear idea and shared vision among committee members, staff and volunteers of what constitutes success
- Ensuring the organization is better informed of the real issues affecting their beneficiaries enabling it to design future services based on robust feedback and consultation

- Enhancing the credibility and public image of the organization which leads to increased interest from users and funding bodies
- Helping the organization review its overall plan for achieving its aims and exploring other potential opportunities

Setting up a monitoring and evaluation system

It is important to be clear about what you want to evaluate and what you need to monitor to achieve this. You need a balance between statistical or quantitative data and more in-depth qualitative feedback to be able to measure the impact of your services. Once you have agreed with staff, volunteers and committee members what your priorities for evaluation are you can then:

- Find out from users what they require of your service, what you are trying to achieve and how you are planning to do it. Ask them for regular feedback on how the service is helping them.
- Agree some outcomes or targets that you will measure against – for example 80% of service users will rate our service excellent on feedback forms, the percentage of young people using the service will increase by 20% etc. Try to make your targets realistic and specific with numbers if possible which will make it easier for you to assess your impact.
- Agree the methods you are going to use to collect, store and analyze monitoring data. Systems should be as straightforward as possible and not overly time-consuming. Use the systems you already have for obtaining feedback such as registration and membership forms, committee reports, databases, diaries and events.
- Hold regular meetings to report on progress, draw conclusions and decide on changes and improvements.
- Undertake consultation with service users at specific intervals to measure achievements and the difference the service is making. You can use questionnaires, case studies, focus groups and telephone surveys but remember that whatever methods you use need to be appropriate and accessible for service users. This process will help you decide if the project has achieved its objectives; that the money has been well spent and whether or not the project should continue.
- Hold an annual event, involving users, to report on any successes and emerging issues or trends that will be addressed in future service delivery planning in the longer term

Evaluation should not only answer questions - it should also prompt fresh thinking. If you have asked the right questions, an evaluation will tell you not only what you have achieved, but also how you did it and what was most effective. It will help you find the areas where improvement or change is needed, and help you to provide the best service to users.

Further information

Charities Evaluation Service – www.ces-vol.org.uk
Telephone: 020 7713 5722

Big Lottery Fund – www.biglotteryfund.org.uk
Telephone: 0845 4 10 20 30